By Florence May

Volunteer Management Best Practices

Assessing Five Key Elements of Your Event Volunteer Program

I need help! Directions? Maps? Programs?

While the event staff is working hard behind the scenes, your festival guests will receive "help" from the mouths and hands of front line volunteers. Ironically, the public face of your event is the very group of people who spend the shortest amount of time each year with your operation.

How do you ensure that your volunteer program is properly positioned to support your event while simultaneously developing volunteers who can meet super human expectations?

The following article and questionnaire provides the opportunity for an internal assessment of your event volunteer management system. Event managers typically have solid measurements for success in publicity, sponsorship and ticket sales; however, assessing volunteer management programs may seem less tangible.

The success of a good volunteer program involves the same key elements of managing full time employees. We will explore the importance of training, defining job responsibilities, risk controls, scheduling, communications and evaluations… all with consideration to tremendous generational differences that add a complicated dimension to volunteer management in 2010.

1. Proper Volunteer Training

- *Scenario: A new event volunteer is trying to assist event participants but gives incorrect directions.*
- *Scenario: A volunteer is unclear on his duties. He would like to check with a team leader but has not been introduced to anyone who appears to be in charge.*
- *Scenario: A volunteer team leader is asked about the title event sponsor by a guest. The volunteer has no idea what service the title sponsor provides.*

These situations are strong indications of poor preparation by the volunteer manager and supporting team leaders.

Good training sets the stage for volunteer confidence, competence and camaraderie. This training should be comparable to an employee job orientation with a lot of enthusiasm. Volunteer training is time for newcomers to be instructed on job specifics and to be introduced to their team. Team leaders and veteran volunteers have the opportunity to share their experience and welcome newcomers.

Generation X and Y volunteers (Mid 40s to teens) will seek training that gives them "event insider" status and a sense of job ownership. The more mature volunteers of the Boomer and Veteran generations will look for well organized management and clear directions.

The event staff has the opportunity to create a well orchestrated team atmosphere with a motivational training program.

2. Realistic Job Descriptions

- *Scenario: The majority of volunteers are only interested in attending the event concert at no cost. They work as little as possible and leave as soon as they've "earned" their tickets.*

- *Scenario: A shy, reserved volunteer is assigned to work in a busy parking lot directing traffic.*
- *Scenario: A fair skinned young volunteer is left alone at a remote entrance gate with no shade, sunscreen, break or water for four hours in the boiling sun.*

The top responsibility of the volunteer manger is to get volunteers who are truly helpful and productive. Unfortunately many volunteer programs operate under the short term aim of recruiting the most volunteers possible simply to fill slots. The pursuit of sheer numbers without an emphasis on job specifics (e.g. skills, restrictions, schedules) tends to be poor use of organizational resources.

The best approach is to recruit volunteers who match your organizational needs in order to form a long mutually beneficial relationship. It is critical to clearly define and communicate job requirements (e.g. technical skills, beverage server's license) and expectations (e.g. friendly, mobile, flexible, works well in high stress situations) if you expect to recruit the right people to advance your mission.

Some volunteers will be patient with "seat warmer" positions but younger volunteers will be more interested in jobs that make an impact and helping people directly. Younger volunteers also are most likely to expect good use of their time and talents.

Talented volunteer mangers will marry a volunteer's skills, interests, capabilities and availability with specific event needs for the most effective utilization of organizational resources.

3. Adequate Risk Controls

- *Scenario: A volunteer shows up for duty with an infant and a small pet dog. The dog bites a child at the event.*
- *Scenario: A volunteer who is wearing sandals while moving chairs for a volunteer training, stubs her toe ripping off the toenail and part of the toe bed. She requires immediate surgery.*
- *Scenario: Pregnant volunteer is handing out brochures. She trips over a misplaced box of brochures, falls down a short flight of stairs and goes into labor.*
- *Scenario: Festival childcare provider is discovered to be a registered pedophile. Front page news that the festival did not screen its childcare providers.*
- *Scenario: Well meaning volunteer invites event guests who can't find a hotel to stay at his house. Event guests steal money and small electronics.*
- *Scenario: Volunteer gets badly injured during an event. The event organization has insurance but it does not cover volunteers*

only staff. Volunteer sues the title sponsor of the event.
- *Scenario: Volunteer driver is hit while driving an event car. The driver of the second car is uninsured and to make matters worse the volunteer's driver license is expired.*

The scenarios, described above, are all based on real events. In every instance proper preventive measures were not taken. The volunteer was not given a dress code specifying closed toe shoes. Volunteers were not screened in advance for sensitive positions. Volunteers were told to assist guests in finding accommodations. Driver licenses were not checked during training.

Risk control is like an umbrella in the rain. The umbrella prevents you from getting wet, cold and potentially sick. Proper risk control can protect your organization, sponsors and affiliates from unnecessary liability.

Job perils, site concerns and basic security precautions are important risk elements to address starting in the registration process and on the volunteer waiver. Risk concerns should be reinforced in the volunteer handbook and training.

Event managers still need to have insurance for the worst case scenario. All event volunteers are not covered by personal homeowners and motor vehicle insurance.

4. Volunteer Management Technology

- *Scenario: The volunteer provides contact information online but is not able to select her own jobs or shifts. She voices frustration to friends about the wasted time making multiple calls to coordinate with the volunteer manager.*
- *Scenario: The volunteer manager spends weeks trying to manually match volunteers to jobs and shift times. Later the volunteer manager can't get reports to sort correctly and stays up all night for a week trying to resolve the challenge.*
- *Scenario: The volunteer manager does not require e-mail contact information for all volunteers. Gas line blows up under volunteer parking garage. She is unable to communicate timely schedule changes or emergency information with event volunteers.*

Most events require X and Y generation volunteers who are relatively young, energetic, mobile and technically savvy. In our busy lives, online registration is an expectation for the X and Y generations. Online registration allows 24/7 access for the volunteer wants to manage his/her own volunteer account by registering for preferred jobs and shifts.

Online volunteer registration also answers the challenge of fewer staff and tight budgets. These registration tools decreases administrative work by 50-75% percent allowing volunteer managers to substantially increase their productivity while also substantially reducing mail and phone costs.

5. Evaluation

- *Scenario: High no show rate. Trouble recruiting new volunteers.*
- *Scenario: High no return rate. Volunteers come once and don't return the next year.*

The evaluation of your volunteer program should include feedback from leaders and frontline volunteers.

Wrap up sessions should take place while the event recollections are still fresh in everyone's minds. This objective discussion should include key staff and volunteer leaders. The volunteer operations and logistics wrap up is a review of what went right, what can be improved and recommendations.

Your front line volunteers may participate in simple onsite surveys for immediate input. Anonymous electronic surveys can provide valuable feedback from your team leaders and your front line volunteers. Electronic surveys can be automatically set up to tabulate results.

Conclusion

You have considered the fundamentals of your volunteer management program. Consider the number of ✓s, ?s, Xs, and !!s on your checklist.

Have you defined key *volunteer management policies* and procedures?

Do you have opportunities to reduce and *eliminate problem* or potential risk areas?

Did you identify tools for achieving *continuous improvement*?

Are there items for *corrective action*?

Can you highlight areas of *good practice*?

Volunteers can be your greatest event assets. Prepare to get the best return on your volunteer investment!

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Volunteer Management Assessment

Please take a few minutes to consider the foundational elements of your volunteer program using the following informal ratings.

✓ Check the items that are running smoothly. These should be no-to-low risk items.

? Put a question mark beside the items that need some improvement and may have moderate risk.

X Put X next to the items that need immediate attention due to cost or risk.

‼ Two exclamation marks by the items that have extremely high risk.

Volunteer Training

_____ Does your organization supply a volunteer handbook with standard operating procedures, event policies, dress code, site map and emergency protocols?

_____ Does your volunteer training program set the stage for a positive and engaging volunteer experience?

_____ Do your event managers, team leaders or committee chairs review job responsibilities with volunteers prior to the event?

_____ Does your organization have a vetting process to ensure each volunteer is capable of executing their job requirements?

_____ Prior to the event, do your volunteers receive a site walk through to become familiar with their work environment?

_____ Do your volunteers receive a complete event overview? All activities? Sponsor awareness? Venue familiarity?

_____ During training does your event leadership, preferably the Board President or Executive Director, communicate how important volunteers are to the success of the event?

Job Descriptions

_____ Do you have well defined volunteer job descriptions based on actual event needs?

_____ Do you provide job descriptions to volunteers in advance of registration?

_____ Do your job descriptions include shift times and specific locations?

_____ Do you specify any financial cost to the volunteer? Parking? Food?

_____ Do you provide realistic expectations? High traffic zone? Nonstop busy? Slow periods? Solitary? Lift 15 lbs? Sitting the entire time? Exposed to sun, rain, snow? Stressful environment?

_____ Does the job require a skill? A security or background check? A valid driver's license? A beverage server's certification? Computer experience?

_____ Does the volunteer opportunity have restrictions? A minimum age? Experience? Must be selected? Approved by a team leader?

_____ If you allow youth volunteers, do you clearly establish adult oversight requirements?

Risk Controls

_____Do your volunteer's job descriptions clearly identify requirements and risk? During volunteer training do you identify facility related risks?

_____Do your volunteer waivers specify the volunteer's responsibilities? Has your attorney reviewed your waiver within the past two years?

_____Does your event insurance provide financial protection for the event management organization if a worst case volunteer liability scenario occurs despite precautionary measures?

_____Do your volunteer waivers encourage volunteers to take responsibility for their actions? Does the waiver discourage volunteers from taking risks that put the volunteer, or the organization, in a dangerous or irresponsible position? Does the waiver protect the event rights owner, the event management team, sponsors and any affiliated organizations?

_____Is the physical signing of a waiver mandatory before volunteers work a single event activity? What is the process for physical retention of these documents? How are they accessed by management if there is an incident?

_____If you use an online waiver as part of your volunteer registration process, will the online waiver acceptance hold up in your state court?

_____If volunteers drive event or personal vehicles as part of their event duties, do you verify driver's licenses and personal auto insurance? Does your event insurance cover volunteer drivers?

_____Has your insurance company reviewed your volunteer policies, handbook and waiver to ensure that requirements are met?

_____Do you require security and background screening for volunteers who are supervising children, have access to VIPs, contact with personal data or work in sensitive locations?

Communications & Technology

_____Does your organization have updated volunteer databases and automated communications tools that allow for alternate staff to step in if your volunteer manager would become unavailable or incapacitated?

_____Does your registration process allow volunteers to select their own jobs and specific shift times?

_____Does your volunteer manager have the capability to instantly e-mail all event volunteers with routine changes or crisis messages?

_____Does your volunteer manager have the capability to build reports that inform decisions (e.g. specific shift or job shortages) and support logistical needs (e.g. shirt orders, food needs)?

_____Does your volunteer manager have the capability to electronically track attendance? Do you know who attended training? Who completed all of their volunteer shifts? Who collected a t-shirt and event ticket but did not work their shifts?

_____Do you electronically blacklist volunteers who are disruptive, dangerous or do not complete their commitments?

Evaluation

_____Do you allow for anonymous feedback with specific questions and open comments? Do you ask volunteers for recommendations to improve your operations?

_____Do you conduct a wrap up session with your volunteer team leaders or committee chairs within a short time following the event to evaluate what went well and what did not go well?

_____Do you evaluate the actual number of volunteers that are required for each job and shift? Do you challenge team leaders to look for efficiencies that make best use of volunteer time and energies? Do you have too many or too few volunteers?

_____Do you evaluate the most common volunteer management problem areas? Communications? Registration process? Onsite coordination? Training? Job descriptions?